EasyStaff® Application User Manual

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TABLE OF CONTENTS

TABLE OF FIGURES

1.0 Scope

1.1 Identification

This user manual documents the EasyStaff® software application and contains instructions for general and administrative users.

EasyStaff® is a web-based software application developed by Systems Definition, Inc. (SDI) that allows Fire Operations personnel to quickly and easily fill out tour rosters and to define radio identification data to support safety and accountability efforts. The application is easy-to-use software refined for real-world use, honed from lessons learned building accountability applications for New York City Fire Department (FDNY).

EasyStaff® enables rapid and accurate roster preparation and streamlined reporting. EasyStaff® links Unit, assignment, personnel, and radio identification information, by tour, to support fireground safety and accountability activities. Features include streamlined spare radio management to ensure identification accuracy when spare radios are used in the field.

The application requires minimal computing resources and eliminates clunky paper-based forms. EasyStaff readily integrates into daily Fire Operations and is a valuable tool geared for Operations personnel closest to the action. Data generated in EasyStaff® can be output to SDI's patented mayday roll-call software applications to support firefighter identification and accountability on the fireground. For example, EasyStaff® interfaces to SDI's APX® Personnel Accountability Application (APAA) for use with the Motorola suite of APX® hand-held radios.

1.2 Document Organization

This document is organized into the following major sections:

1.0 – Scope
2.0 – Log In
3.0 – Roster
5.0 – Reports
6.0 – Quick Compliance Report
7.0 – Admin
8.0 – Assets

1.3 Document Conventions

Throughout this document, text in **`Courier Bold`** reflects actual text on the application screen, usually on a button or title bar.

Orange text, boxes, ovals, and arrows are used for labeling purposes and do not appear on the actual application screen.

EasyStaff is a registered trademark of Systems Definition, Inc.

APX is a registered trademark of Motorola Trademark Holdings, LLC

2.0 Log In/Sign Out

Users must log in to access the EasyStaff® application.

2.1 Log In

Perform the following steps to log in:

1. Enter username into the **Username** field. Usernames are not case-sensitive.
2. Enter password into the **Password** field. Passwords are case-sensitive.
3. Click the button next to **Yes** or **No** to choose whether to remember login information. Selecting **Yes** saves the username for future logins.
4. If necessary, click **Reset** to clear entered data, then repeat Steps 1-3.
5. Click **Submit**.

Note: If necessary, click **Forgot username or password?** to retrieve a new password (see section 2.1.1).

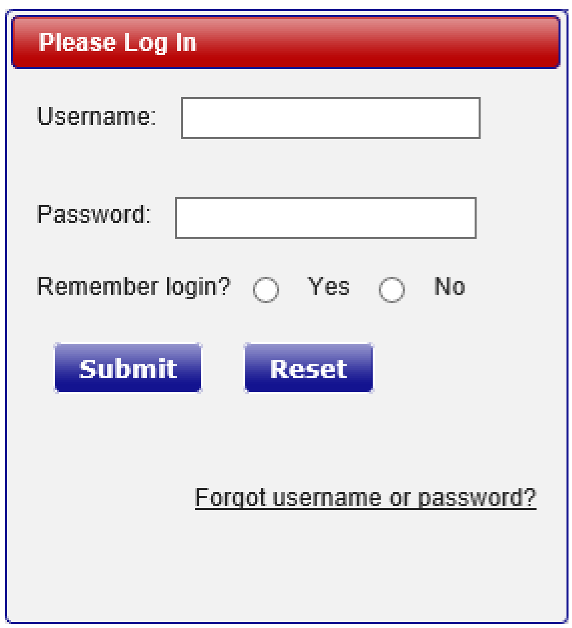


Figure 2-1. Login Screen

2.1.1 Retrieve New Password

Users who cannot remember their username and/or password can retrieve new passwords. Perform the following steps to retrieve a new password:

1. Click **Forgot username or password?** in the **Please Log In** box. The **Enter Email to Retrieve New Password** window appears (see Figure 2-2).
2. Enter username into the **Username** field or enter email address into the **Email** field, first name into the **First Name** field, and last name into the **Last Name** field.
3. Click **Submit**. The EasyStaff® application will send an automatically generated password to the provided email address.
4. Log in with the new password. Upon logging in, the **Password change required** window appears (see Figure 2-3).
5. Enter a new password into the **Password** field.
6. Enter the same new password into the **Enter Password Again** field.
7. Click **Submit**. A **Success** window appears to confirm that the password was changed successfully (see Figure 2-4).

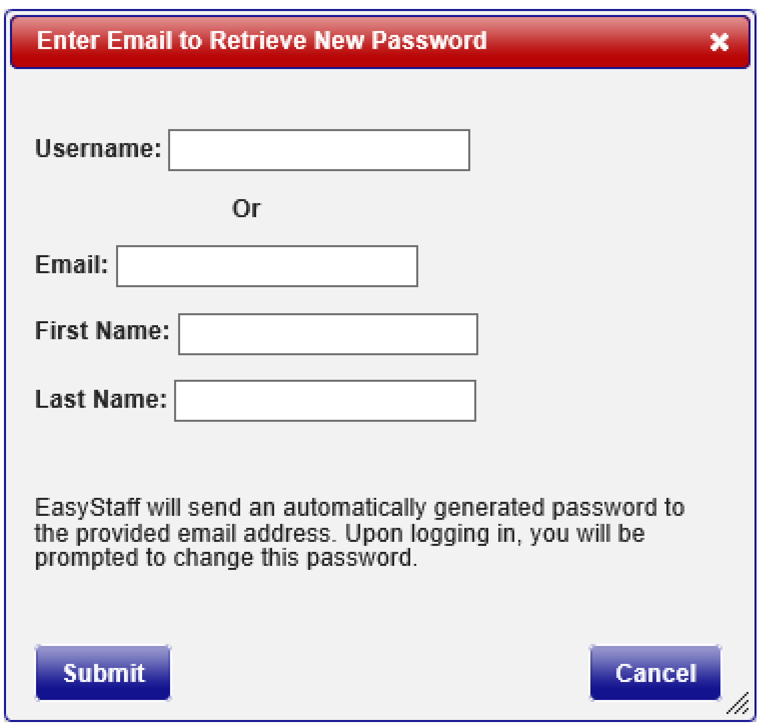


Figure 2-2. Retrieve New Password

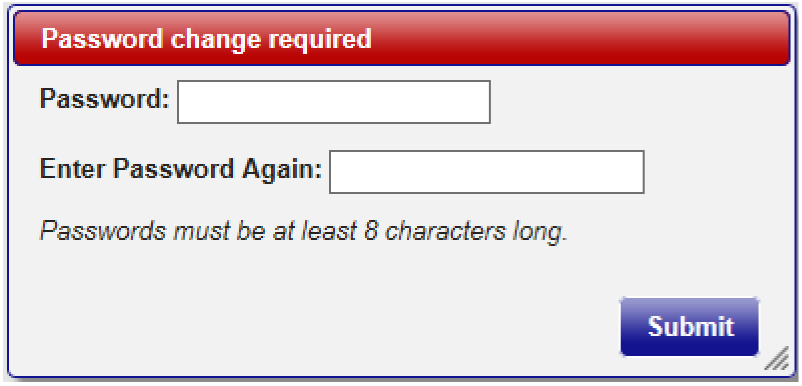


Figure 2-3. Password Change Required

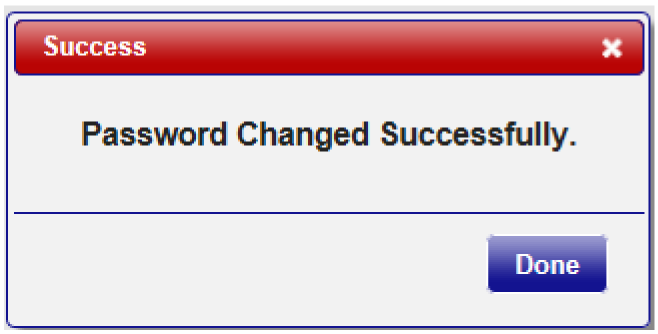


Figure 2-4. Success Window

2.2 Sign Out

To sign out of the EasyStaff® application, click **Sign Out** in the upper-right corner of the screen as shown in Figure 2-5.

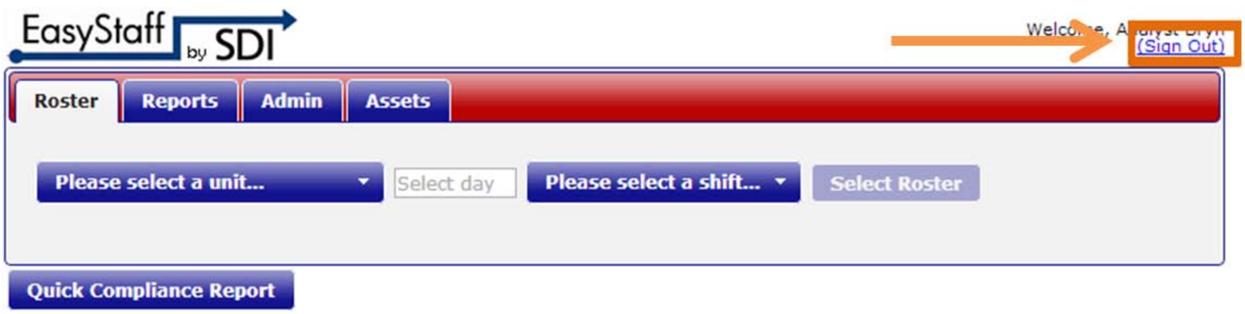


Figure 2-5. Sign Out

3.0 Getting Started

This section describes the optimum order of entering Department organization data when using EasyStaff® for the first time (Administrative User privileges are required to configure EasyStaff®).

Setting up the Department structure and radio identification data (or other asset data such as SCBA ID) in EasyStaff® is very important, and it is a good idea to have the Department's organization chart/matrix and list of radios on hand. This critical information is entered under the Admin tab in the application. After this initial data entry is completed, features such as Roster and Quick Compliance can be used.

Information should be entered in the order listed below. Assignments are entered first since they will be required when entering the Units, Units are entered second since they will be required when entering Workgroups, and so forth. Each item builds on the previous item.

1. Assignments (e.g., Battalion Chief)—see section 7.1
2. Units (e.g., Battalion 5)—see section 7.3
3. Workgroups (e.g., Franklin Station)—see section 7.2
4. Shifts (e.g., 24 Hour)—see section 7.5
5. Assets (e.g., Radios and BAs)—see section 8.0.

4.0 Roster

The **Roster** tab allows users to view and edit roster assignments. All users have access to this tab.

4.1 Roster Selection Screen

The Roster Selection Screen is displayed after successfully logging in. Perform the following steps to select a roster:

1. Select a unit from the **Please select a unit…** drop-down menu.
2. Click in the **Select day** field to open a calendar, then select the desired date. Note that rosters may only be completed one day in advance.
3. Select a shift from the **Please select a shift…** drop-down menu.
4. Click **Select Roster** to begin roster assignment.

Figure 4-1. Roster Selection Screen

4.2 Roster Assignment Screen

After selecting a specific roster, the Roster Assignment Screen for the shift is displayed. The screen may be unpopulated when first launched unless it has been filled out for the day and shift already. The screen displays the assets (radios and masks) assigned to each position.

The Roster Assignment Screen provides the following options to create and modify rosters:

- **`Available People`**: View the personnel available to be assigned to the roster. Personnel in this list are members of the selected unit and shift. Names with a red background indicate personnel already assigned to a roster.
- **`People in other units`**: Search for personnel in other units to assign to the roster.
- Roster Position (**`Battalion Chief`**, **`Officer`**, etc.): Click and drag names of available people into the **`Person`** fields to assign them to roster positions. Icons for any assigned Assets such as radios and Breathing Apparatuses (BAs) are displayed beside each name.
- **`Notes for this roster`**: If desired, enter any notes into this field.
- **`Print this roster`**: Print a copy of the roster on a single sheet of paper.
- **`Download this roster`**: Download a copy of the roster as a Portable Document Format (PDF) file.
- **`Save this roster`**: Save the roster displayed on the screen.
- **`Clear this roster`**: Clear the assigned personnel from the roster and remain on the roster assignment screen.
- **`Leave this roster`**: Exit the roster without saving changes and return to the Roster Selection Screen.

Figure 4-2 shows an example roster of 5th Battalion personnel during the 24-hour shift of January 22, 2014. Figure 4-3 shows the Asset icons used in the roster.

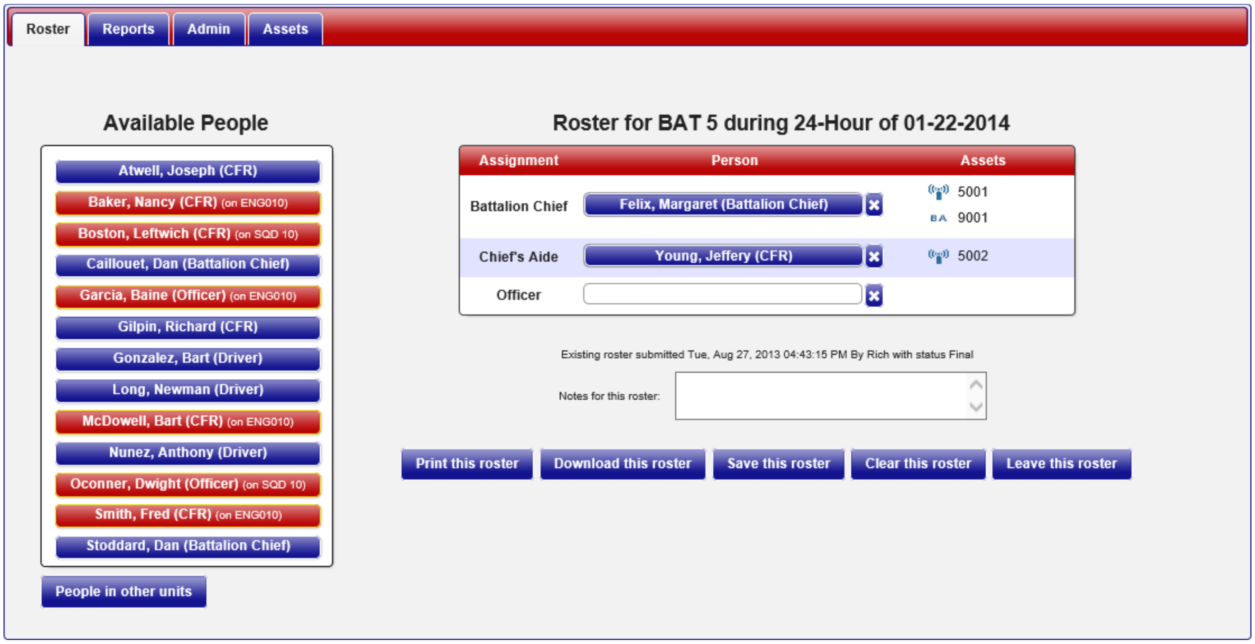


Figure 4-2. Roster Assignment Screen

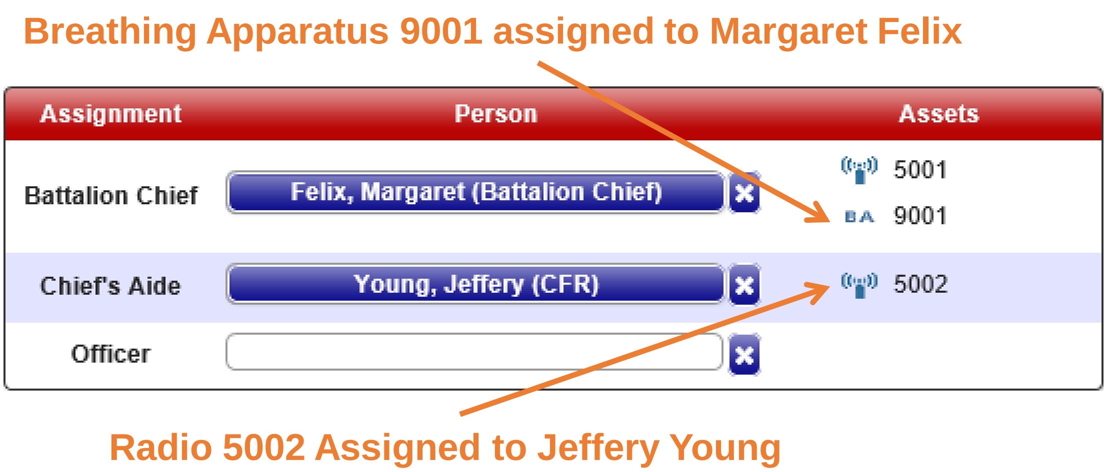


Figure 4-3. Roster Icons

4.2.1 Assign Available Personnel to Roster

Perform the following steps to assign available personnel to the roster:

1. Click and drag names from the **`Available People`** list to the roster position fields as shown in Figure 4-4. Names with a red background indicate personnel already assigned to a roster. If necessary, click the **`X`** to the right of a person's name to remove the person from the roster.
2. If desired, type notes into the **`Notes for this roster`** field.
3. Click **`Save this roster`** to open the **`Save Roster`** window.
4. Select a status from the **`Select status`** drop-down menu, then click **`Submit`**. A **`Success`** window appears to confirm that the roster was saved.

Note: To cancel roster submission, click **`Cancel`** or click the **`X`** in the upper-right corner of the **`Save Roster`** window.

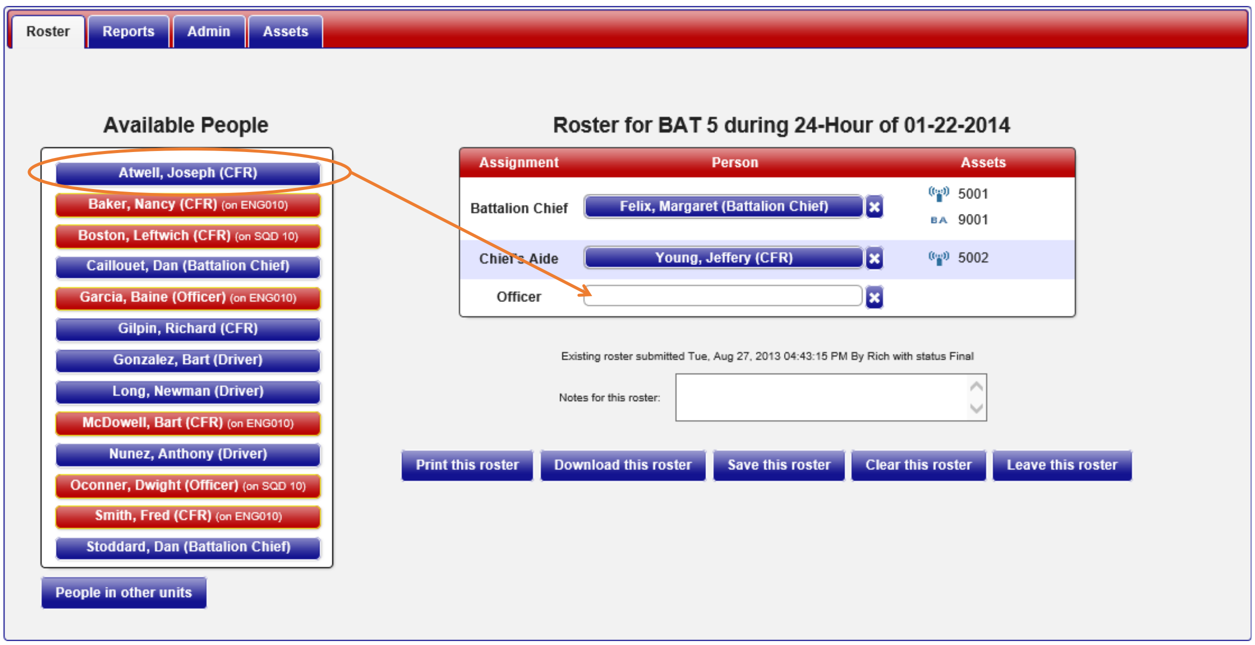


Figure 4-4. Assign Available Person to Roster

4.2.2 Assign Personnel from Other Units to Roster

Perform the following steps to assign personnel from other units to a roster:

1. Click **People in other units** to open the **Person Search** window.
2. Type the desired person's name or a portion of the desired person's name in the search field, then click **Search**.
3. Click and drag the desired person's name to the correct position in the current roster. If necessary, click the **X** to the right of a person's name to remove the person from the roster.
4. If desired, enter notes in the **Notes for this roster** field.
5. Click **Save this roster** to open the **Save Roster** window.
6. Select a status from the **Select status** drop-down menu, then click **Submit**. A **Success** window appears to confirm that the roster was saved.

Figure 4-5 shows the process of replacing the Chief's Aide by clicking **People in other units**, searching for a new name, then dragging that employee into the Chief's Aide Assignment.

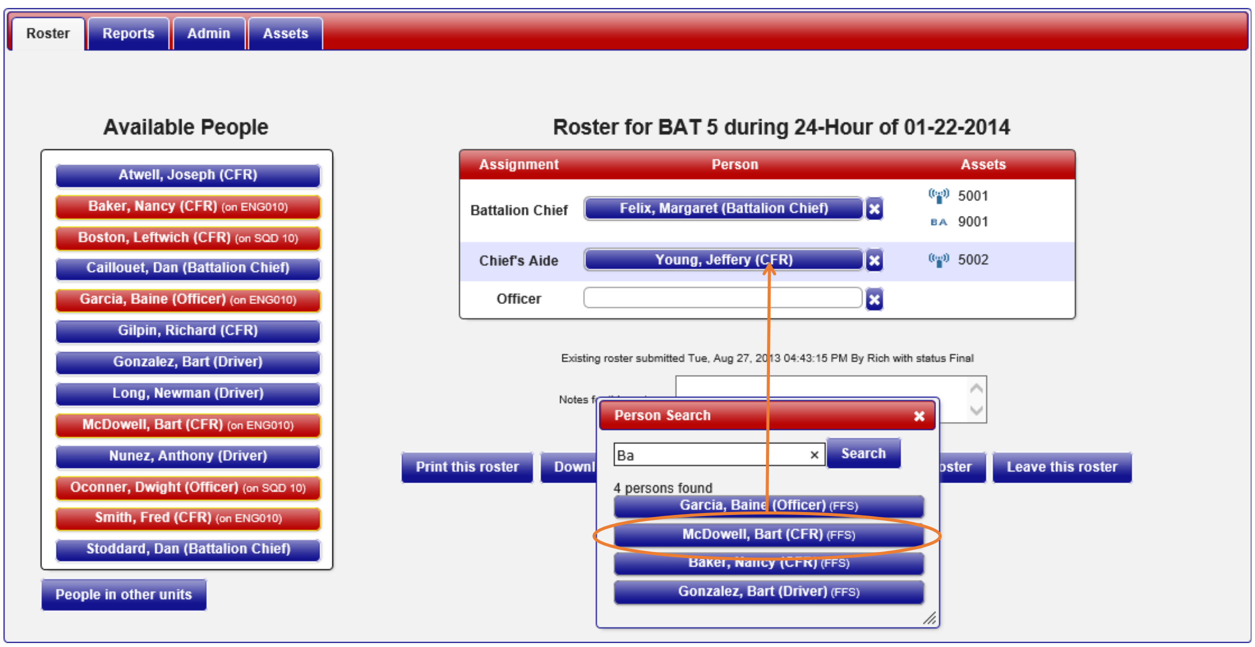


Figure 4-5. Person Search Window

4.2.3 Save Roster

`Save this roster` saves the assignments displayed on the screen. The user can save the roster with any created status (refer to Section 7.6). Perform the following steps to save a roster:

1. Click **`Save this roster`** to open the **`Save Roster`** window.
2. Select a status from the **`Select status`** drop-down menu.
3. Click **`Submit`**.
4. A **`Success`** window appears to confirm that the roster was saved.

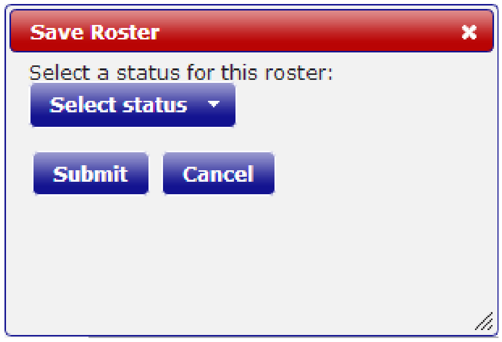


Figure 4-6. Save Roster Window

5.0 Reports

The **Reports** tab (see Figure 5-1) displays roster information for a selected unit and its subordinates. All users have access to this tab. If there have been multiple roster submissions for a shift, there will be one tab for each status in the report, with the current status appearing first. Perform the following steps to view and print a report:

1. Click the **Reports** tab.
2. Click in the **Select day** field to open the calendar, then select the desired date.
3. Click the drop-down menu labeled **Select a shift**, and choose the desired shift.
4. Click the drop-down menu labeled **Select a top-level unit**, and choose the correct top-level unit. Work through the drop-down menus until the desired unit is selected.
5. Click **Generate report** to view the report. The report contains one tab for each roster submission and contains the date and time each roster was saved.
6. If desired, click **Print Report** to open a print-ready report in a new window, then print the report.
7. If desired, click **Download Report** to download the report as a PDF file.
8. Click **Leave Report** to leave the report.

Figure 5-2 shows an example report of Battalion 5's roster during the 24-hour shift of January 22, 2014.

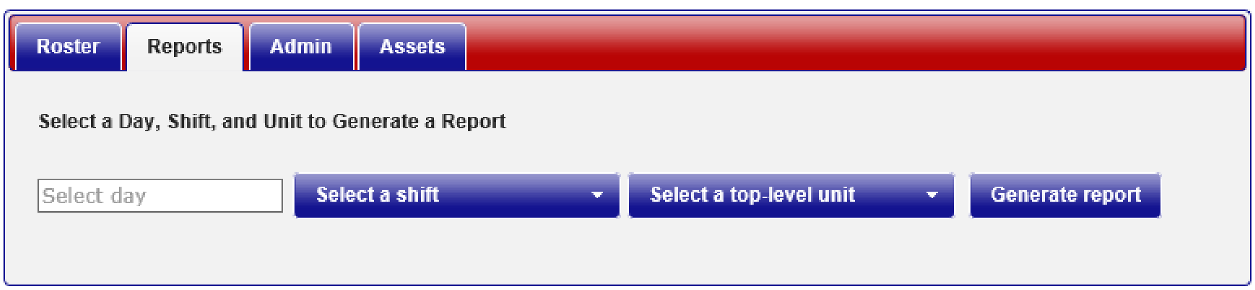


Figure 5-1. Roster Report

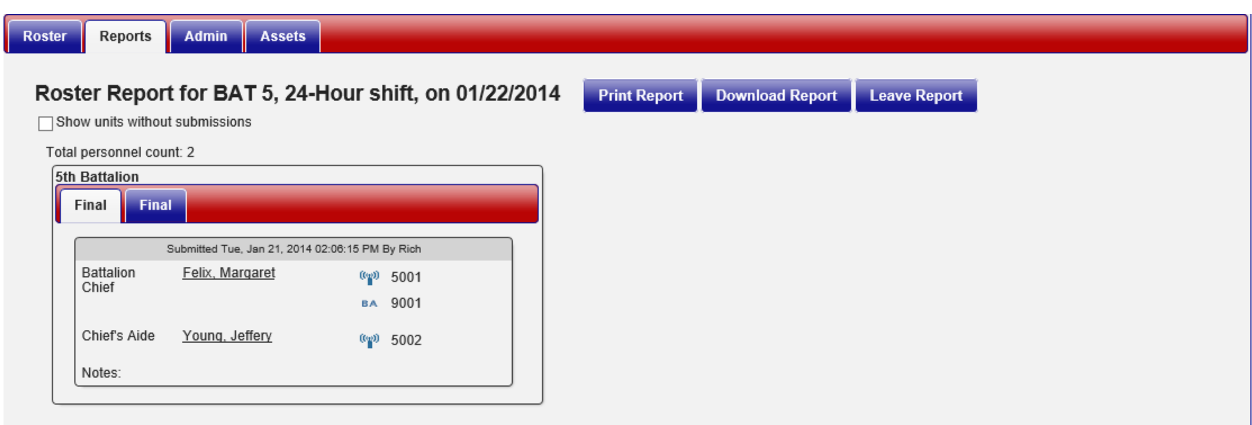


Figure 5-2. Roster Report Example

6.0 Quick Compliance Report

The Quick Compliance Report displays the roster status of all units for the selected shift. All users have access to Quick Compliance Reports. To view the report, click **`Quick Compliance Report`** at the bottom-left of the EasyStaff® screen. The default report displayed is the report for the current shift. Click the arrow buttons at the top of the window to view previous reports. View reports for other shifts by clicking the shift tab (e.g. **`24-Hour`**, **`Admin`**).

Units are grouped by hierarchy in a table. The report columns display the following information:

- **`Name`**: Unit name.
- **`Status`**: Name of status or **`No Entry`** if a roster was not saved.
- **`Subordinates`**: Count of all nested units with related roster status.

Figure 6-1 shows the pop-up window that appears when the **`Quick Compliance Report`** button is clicked.

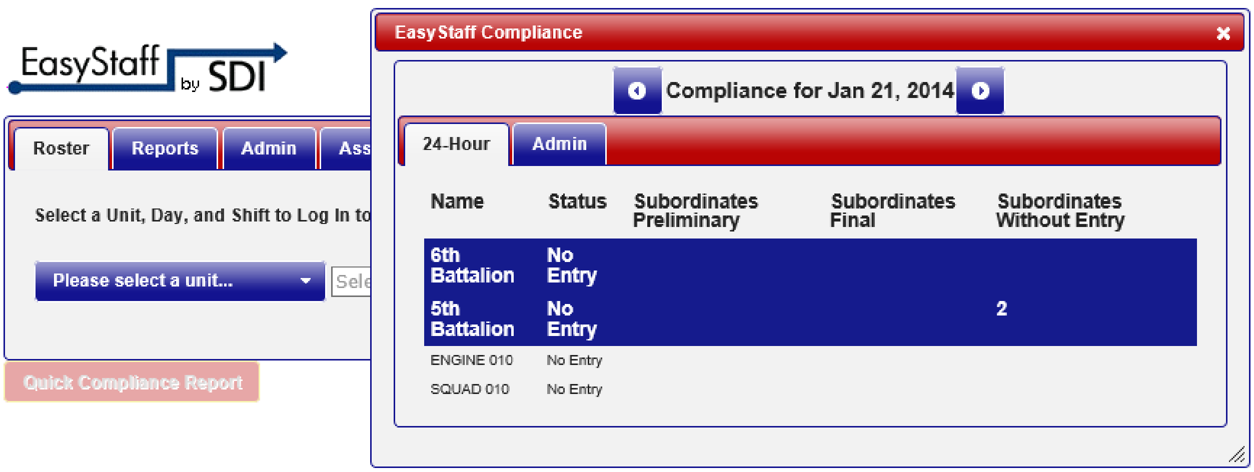


Figure 6-1. Quick Compliance Report

7.0 Admin

The **Admin** tab allows users with Administrator privileges to perform the following functions:

- **Edit Assignments**: Edit an existing assignment or create a new assignment.
- **Edit Workgroups**: Edit an existing workgroup or create a new workgroup.
- **Edit Units**: Edit an existing unit or create a new unit.
- **Edit Personnel**: Edit existing personnel or create new personnel.
- **Edit Shifts**: Edit an existing shift or create a new shift.
- **Edit Status Options**: Edit existing status options or create a new status.
- **Edit Users**: Edit an existing EasyStaff® user or create a new EasyStaff® user.
- **Adjust Settings**: Change EasyStaff® settings for viewing, editing, and saving rosters.
- **Upload Image**: Upload an image.
- **Register APAA**: Register the APX™ Personnel Accountability Application (APAA).

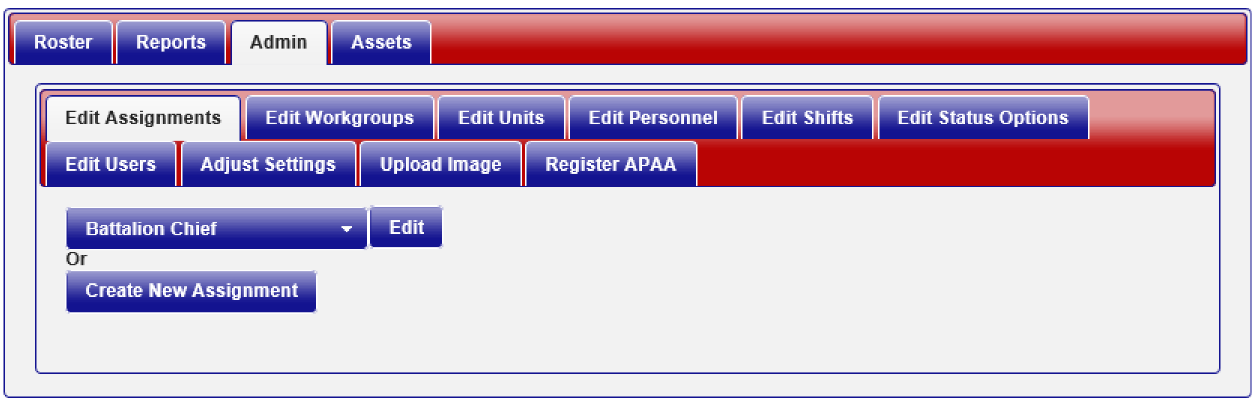


Figure 7-1. Admin Screen

7.1 Edit Assignments

Assignments are the positions that appear in each unit's roster. The **`Edit Assignments`** tab allows administrative users to edit existing assignments and to create new assignments.

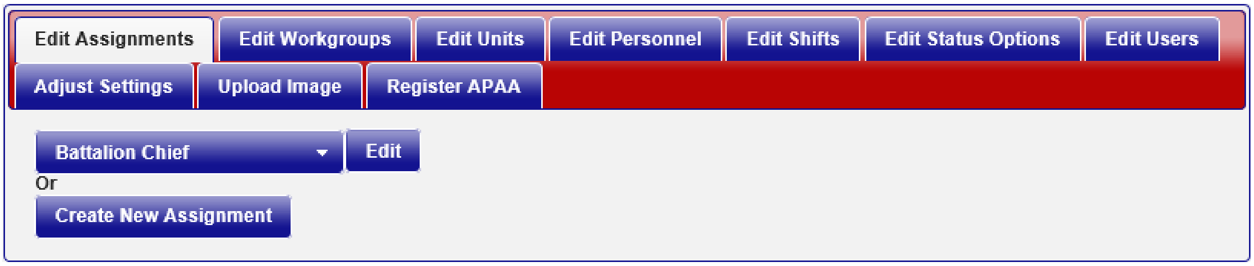


Figure 7-2. Edit Assignments Tab

7.1.1 Edit Existing Assignment

Perform the following steps to edit an existing assignment:

1. Select an assignment from the drop-down menu, then click **`Edit`**.
2. Enter changes into the **`Name`** field to change the name that will display on a roster. The **`Units`** field displays units that will be affected by changes made to the assignment.
3. Click the up ▲and down▼ arrows in the bottom-right corner to change the display position of the assignment.
4. Click **`Save`** to save the changes. A **`Success`** window appears to confirm that the changes were saved.

Note: Click **`Deactivate`** to remove an existing assignment, and click **`Cancel`** to clear all changes and return to the **`Edit Assignments`** tab.

Figure 7-3 shows **`Battalion Chief`** in the **`Edit Assignments`** tab, where it can be renamed or moved up or down in the sort order.

Figure 7-3. Edit Existing Assignment

7.1.2 Create New Assignment

Perform the following steps to create a new assignment:

1. Click **Create New Assignment**.
2. Complete the **Name** field with the name of the new assignment.
3. Click the up ▲and down▼ arrows in the bottom-right corner to change the display position of the assignment.
4. Click **Save** to save the changes. A **Success** window appears to confirm that the assignment was created.

Note: Click **Cancel** to clear all changes and return to the **Edit Assignments** tab.

Figure 7-4 shows the screen to add a new Assignment, where users can designate the name and the correct place in the sort order.

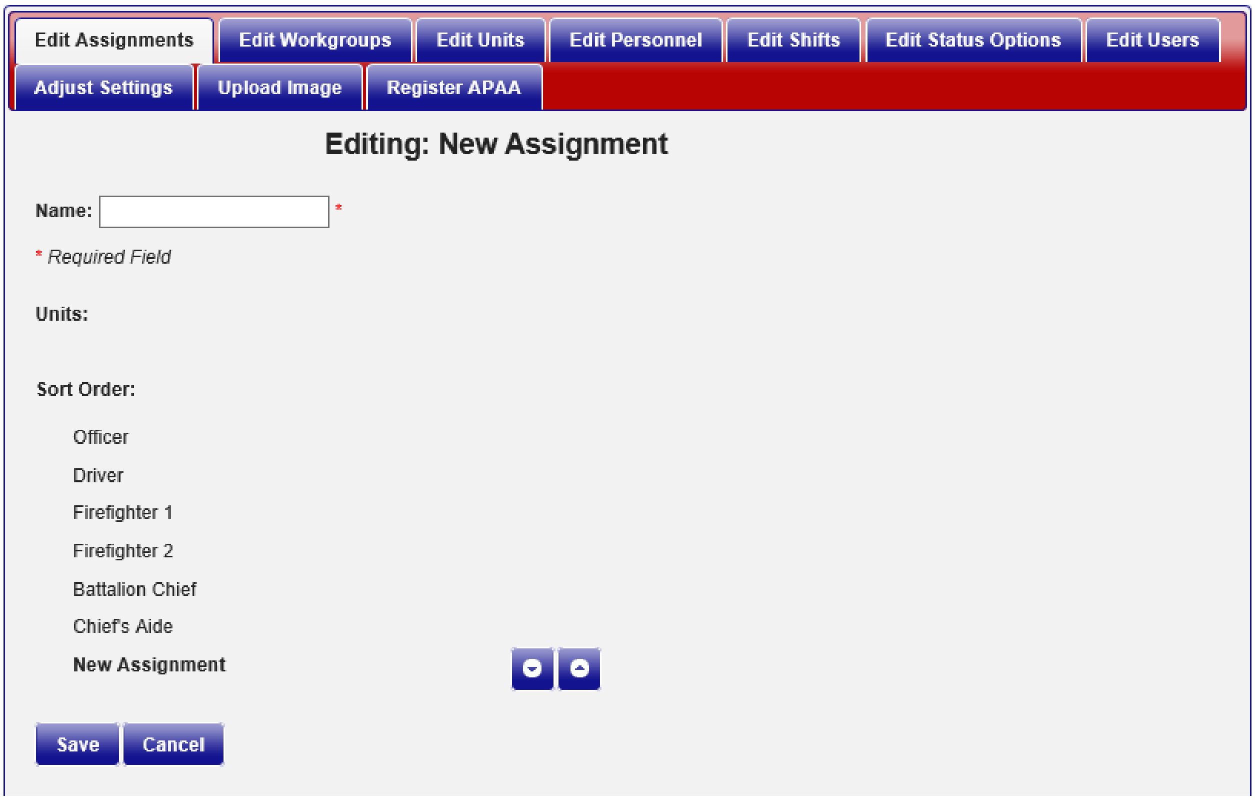


Figure 7-4. Create New Assignment

7.2 Edit Workgroups

Workgroups are groups of units to which personnel are assigned (e.g. 30 people may be assigned to two units that form a workgroup). The **`Edit Workgroups`** tab allows users to edit existing workgroups and to add new workgroups.

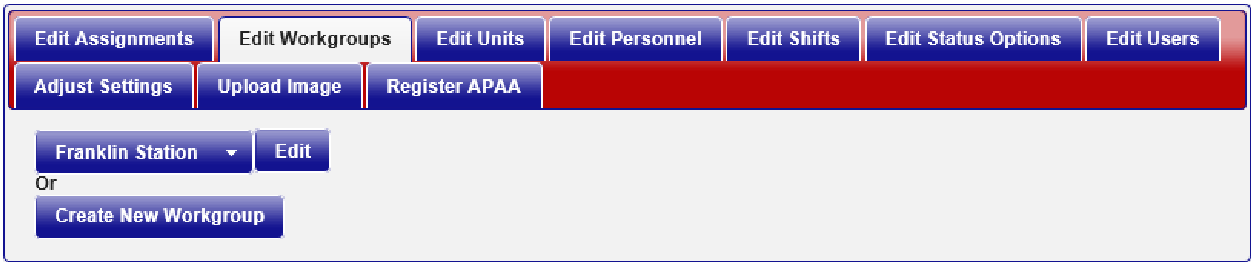


Figure 7-5. Edit Workgroups Tab

7.2.1 Edit Existing Workgroups

Perform the following steps to edit an existing workgroup:

1. Select the desired workgroup from the drop-down menu and click **`Edit`**.
2. Modify the **`Description`** and **`Abbreviation`** fields as needed.
3. Click **`Save`** to save changes. A **`Success`** window appears to confirm that the changes were saved.

Note: Click **`Deactivate`** to remove an existing workgroup, and click **`Cancel`** to clear all changes and return to the **`Edit Workgroups`** tab.

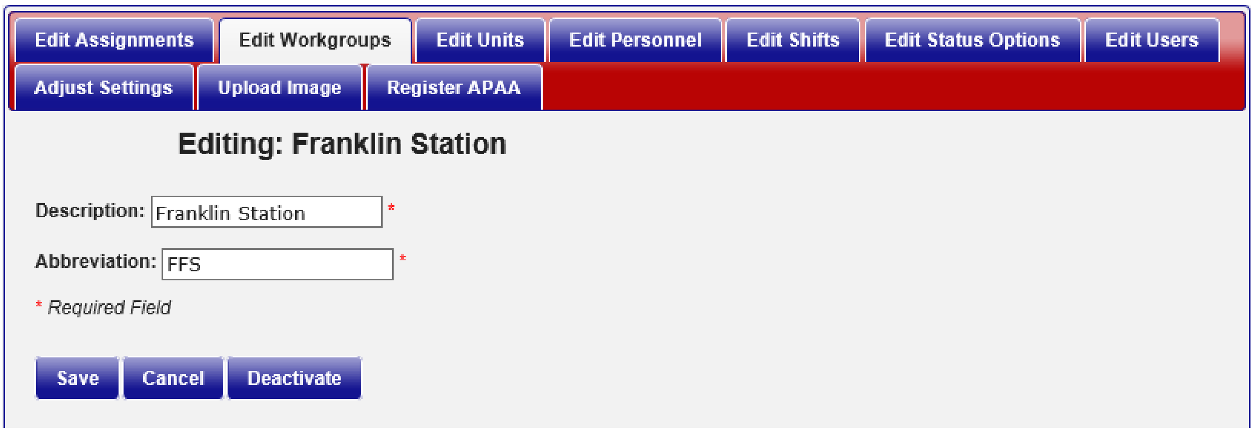


Figure 7-6. Edit Existing Workgroup

7.2.2 Create New Workgroup

Perform the following steps to add a new workgroup:

1. Click **`Create New Workgroup`**.
2. Complete the **`Description`** and **`Abbreviation`** fields.
3. Click **`Save`** to save changes. A **`Success`** window appears to confirm that the changes were saved.

Note: Click **`Cancel`** to clear all changes and return to the **`Edit Workgroups`** tab.

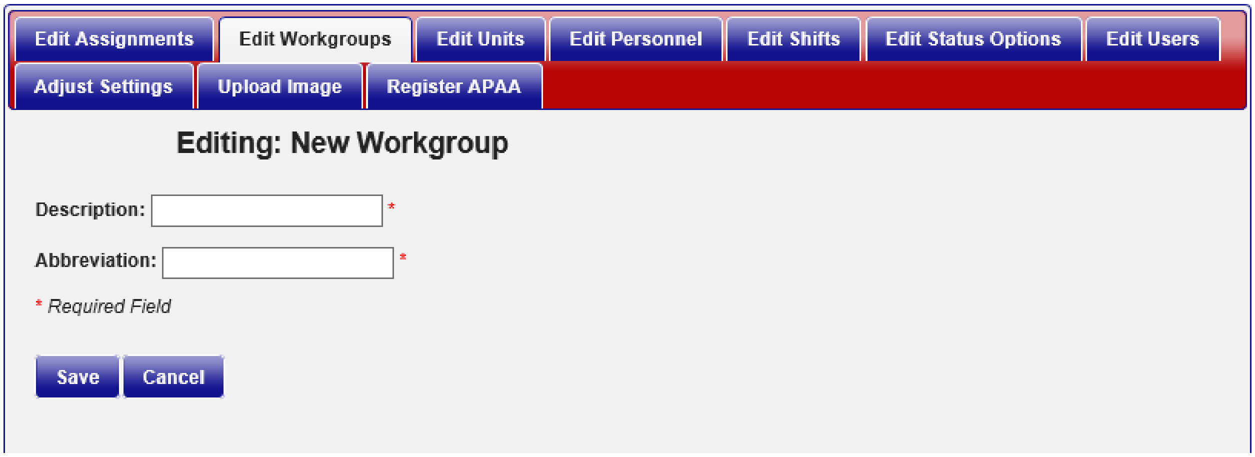


Figure 7-7. Add New Workgroup

7.3 Edit Units

Units are the different groups of fire personnel and can be as large as city-wide fire departments or as small as ladders and special units. The **`Edit Units`** tab allows administrative users to edit existing units and to create new units. Administrative users may click the **`Download Units/Assignments`** button to download a list of all units and assignments.

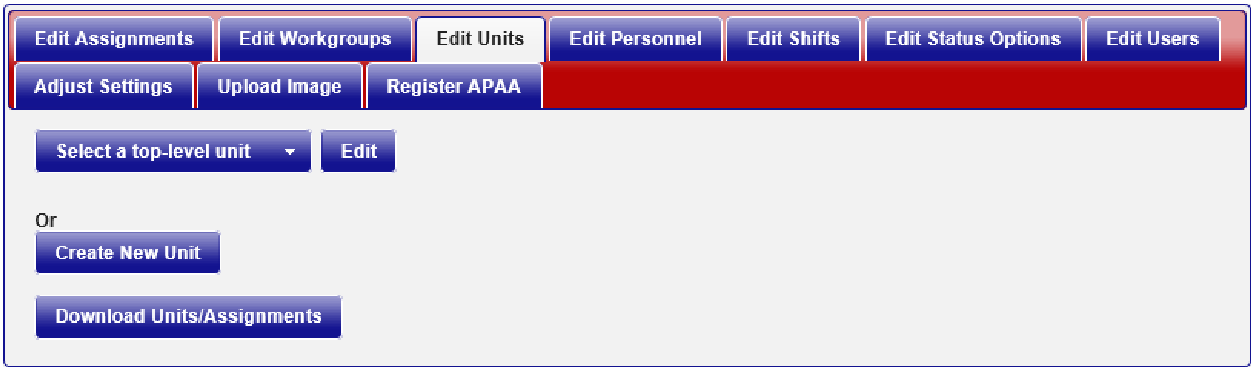


Figure 7-8. Edit Units Tab

7.3.1 Edit Existing Unit

Perform the following steps to edit an existing unit:

1. Select a unit from the **Select a top-level unit** drop-down menu and work through the drop-down menus until the desired unit is selected.
2. Click **Edit** to display the **Editing** window.
3. Modify the **Unit Description** field with the name of the Unit (e.g. **5th Battalion**). This is used to select the unit when completing a roster.
4. Modify the **Unit Code** field. This is the abbreviated name associated with the unit (e.g. BAT 5).
5. Check the **Roster Required** box if a roster is required for the unit.
6. Use the **Parent Unit** drop-down menus to select the correct commanding unit.
7. Use the **Workgroup** drop-down menu to select the correct workgroup.
8. Click **Add Assignments** to open the **Assignments** window.
9. Click and drag the desired assignments into the blank fields located below the last assignment position. If necessary click the **x** to the right of an assignment name to remove the assignment.
10. When all assignments have been added, click the **x** in the upper-right corner of the **Assignments** window to close the window.
11. Use the up ▲and down▼ arrows at the bottom right of the screen to change the sort order. This is the order in which the unit appears in the **Please Select a unit…** drop-down menus and **Reports** tab.
12. Click **Save** to save the changes to the unit. A **Success** window appears to confirm that the changes were saved.

Note: Click **Deactivate** to remove an existing unit, and click **Cancel** to clear all changes and return to the **Edit Units** tab.

Figure 7-9 shows Battalion 5 in the **Edit Units** tab, where it can be renamed, have Assignments added/removed, and go up or down in the Station sort order.

Figure 7-9. Edit Existing Unit

7.3.2 Create New Unit

Perform the following steps to create a new unit:

1. Click **Create New Unit**.
2. Complete the **Unit Description** field with the name of the Unit (e.g. Battalion 5). This is used to select the unit when completing a roster.
3. Complete the **Unit Code** field. This is the abbreviated name associated with the unit (e.g. BAT 5).
4. Check the **Roster Required** box if a roster is required for the unit.
5. Use the **Parent Unit** drop-down menus to select the correct Parent Unit. This is the selected unit's commanding unit.
6. Use the **Workgroup** drop-down menu to select the correct workgroup.
7. Click **Add Assignments** to open the **Assignments** window.
8. Click and drag the desired assignments into the blank fields located below the last assignment position. If necessary, click the **X** to the right of an assignment name to remove the assignment.
9. When all assignments have been added, click the **X** in the upper-right corner of the **Assignments** window to close the window.
10. Use the up ▲and down▼ arrows at the bottom right of the screen to change the sort order. This is the order in which the unit appears in the **Please Select a unit…** drop-down menus and **Reports** tab.
11. Click **Save** to save the changes to the unit. A **Success** window appears to confirm that the changes were saved.

Note: Click **Cancel** to clear all changes and return to the **Edit Units** tab.

Figure 7-10 shows New Unit in the **Edit Units** tab where it can be renamed, get a new code, and moved up or down in the sort order.

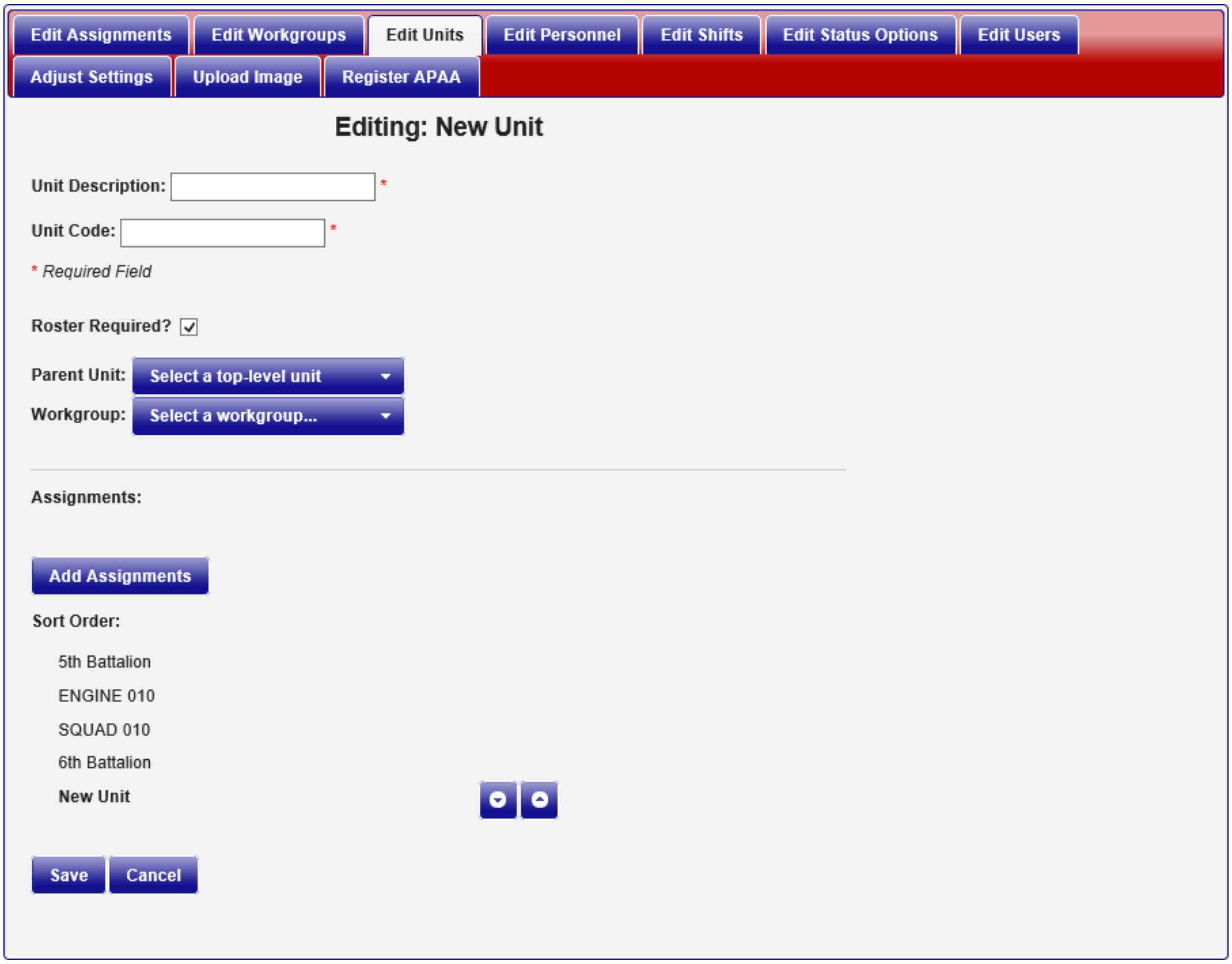


Figure 7-10. Create New Unit

7.4 Edit Personnel

The **`Edit Personnel`** tab allows the user to edit existing Fire Department personnel and to create new personnel. Once created, personnel can be assigned to rosters and can be assigned assets.

Figure 7-11. Edit Personnel Tab

7.4.1 Edit Existing Personnel

Perform the following steps to edit existing personnel:

1. Select the desired name from the drop-down menu and click **`Edit`**.
2. Modify the **`First Name`**, **`Last Name`**, **`Middle Name`**, **`Rank`**, and (**`Ref Num`**) fields as needed.
3. Use the **`Workgroup`** drop-down menu to change the workgroup if needed.
4. Click **`Save`** to save changes. A **`Success`** window appears to confirm that the changes were saved.

Note: Click **`Deactivate`** to remove existing personnel, and click **`Cancel`** to clear all changes and return to the **`Edit Personnel`** tab.

Figure 7-12 shows Jeffery Young's Personnel information in the **`Edit Personnel`** tab, where his **`Rank`**, **`Ref Num`**, and **`Workgroup`** can be updated.

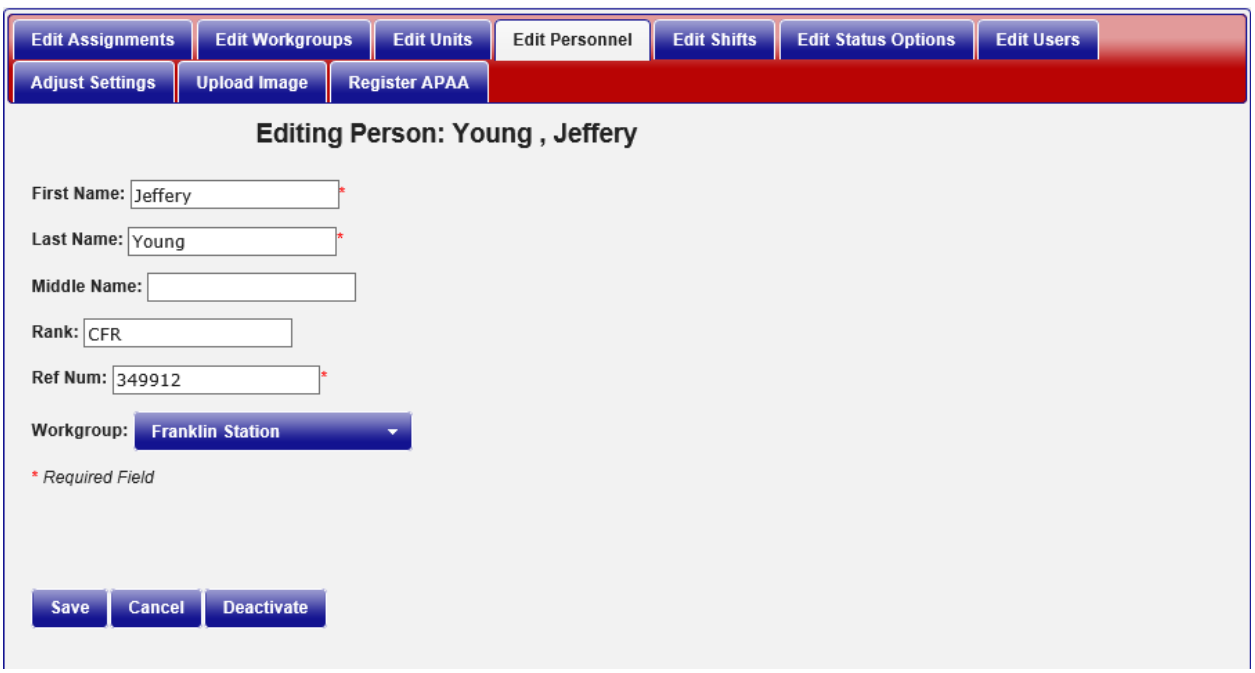


Figure 7-12. Edit Existing Personnel

7.4.2 Add New Personnel

Perform the following steps to add new personnel:

1. Click **Add New Person**.
2. Complete the **First Name**, **Last Name**, **Middle Name**, **Rank**, and **Ref Num** fields.
3. Use the **Workgroup** drop-down menu to select a workgroup.
4. Click **Save** to save changes. A **Success** window appears to confirm that the people were added.

Note: Click **Cancel** to clear all changes and return to the **Edit Personnel** tab.

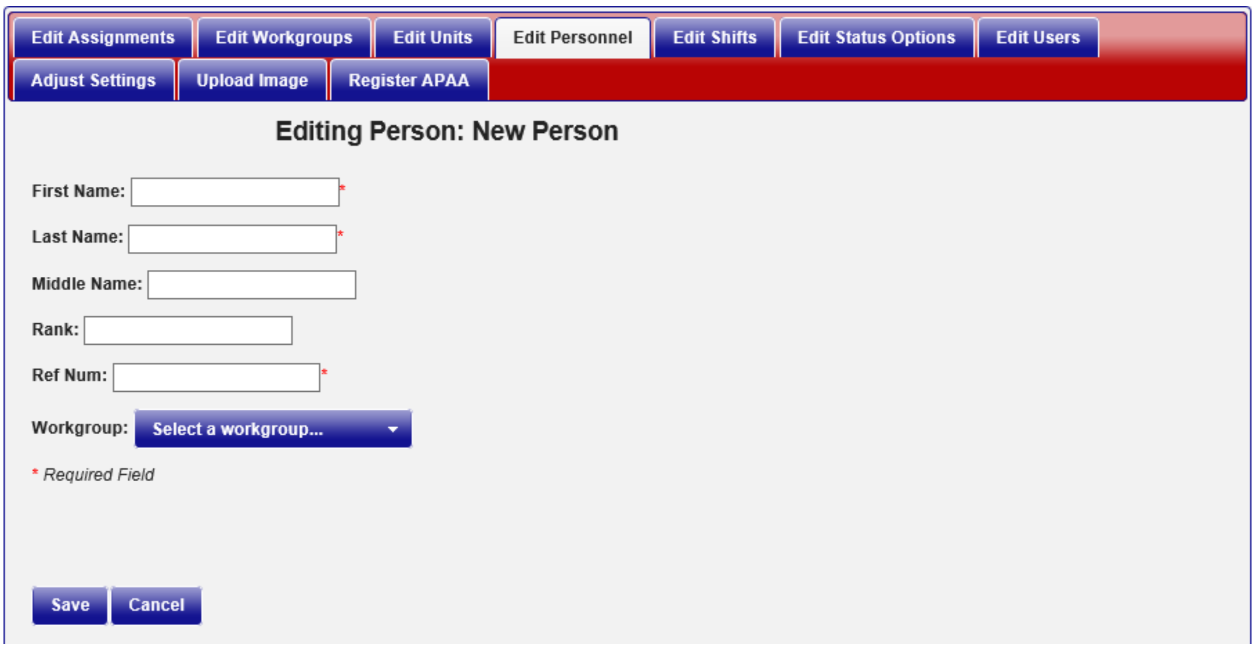


Figure 7-13. Add New Personnel

7.4.3 Upload Multiple People

Multiple people can be added at once to save time. Perform the following steps to upload multiple people:

1. From the **Edit Personnel** tab, click **Upload New People**.
2. Create a .csv file with the **Last Name**, **First Name**, **Middle Name**, **Reference Number**, **Rank**, and **Workgroup** for each person organized into six columns as described in Figure 7-14. Note that reference numbers cannot exceed 10 characters.
3. Click **Choose File** and select the correct .csv file. Refer to Figure 7-15 for a sample correctly formatted .csv file.
4. Click **Show Preview** to view a preview of the assets before uploading (refer to Figure 7-15). If necessary, click **Cancel** to return to the **Edit Personnel** tab.
5. Click **Upload** to upload the people. A **Success** window appears to confirm that the people were uploaded.

Figure 7-14 shows an example of using a .csv file to upload multiple personnel at once.

Figure 7-15 shows a properly arranged .csv file with personnel information.

Note: If the .csv file was formatted incorrectly, an **Error** window identifies the location of the formatting error, as shown in Figure 7-16.

Note: Click **Cancel** to return to the **Edit Personnel** tab.

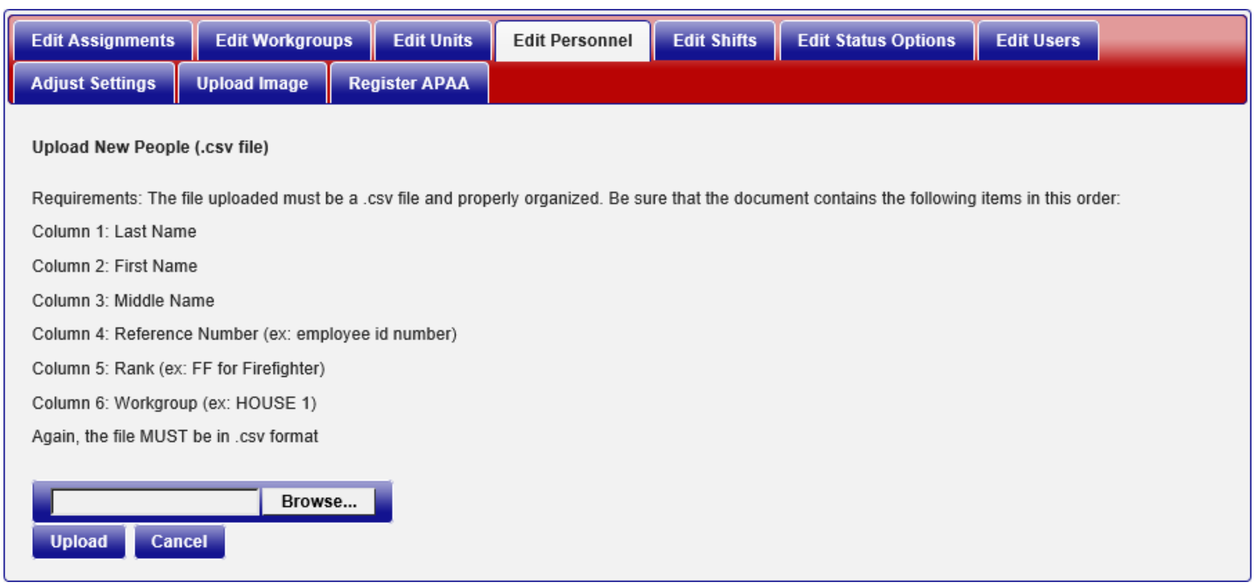
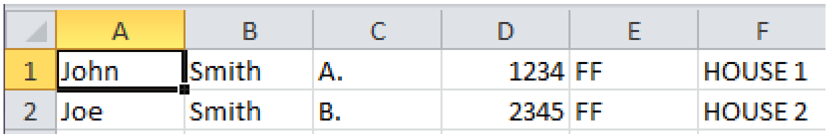


Figure 7-14. Upload New People



	A	B	C	D	E	F
1	John	Smith	A.	1234	FF	HOUSE 1
2	Joe	Smith	B.	2345	FF	HOUSE 2

Figure 7-15. Upload New People .csv File Format

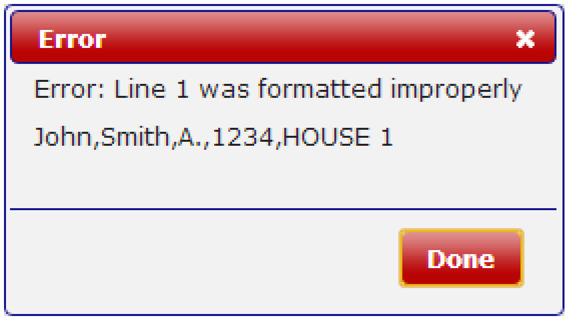


Figure 7-16. Upload New People Error

7.4.4 Search Personnel

Perform the following steps to search for, then edit personnel:

1. Click **`Search People`**.
2. Begin typing the desired person's name in the empty field. A drop-down list will appear with possible matches.
3. Click on the desired person's name to select the person.

Figure 7-17. Person Search Window

7.5 Edit Shifts

Shifts are scheduled periods of work (e.g. Day, Evening, 24-Hour), and each roster covers one shift. The **`Edit Shifts`** tab allows users to edit existing shifts and to create new shifts.

Figure 7-18. Edit Shifts Tab

7.5.1 Edit Existing Shift

Perform the following steps to edit an existing shift:

1. Select the desired shift from the drop-down menu and click **Edit**.
2. The screen displays the shift name. To edit the shift name, click inside the **Name** field and make changes.
3. Click **Save** to save changes. Refresh the web browser in order for saved changes to take full effect.

Note: Click **Deactivate** to remove an existing shift, and click **Cancel** to clear all changes and return to the **Edit Shifts** tab.

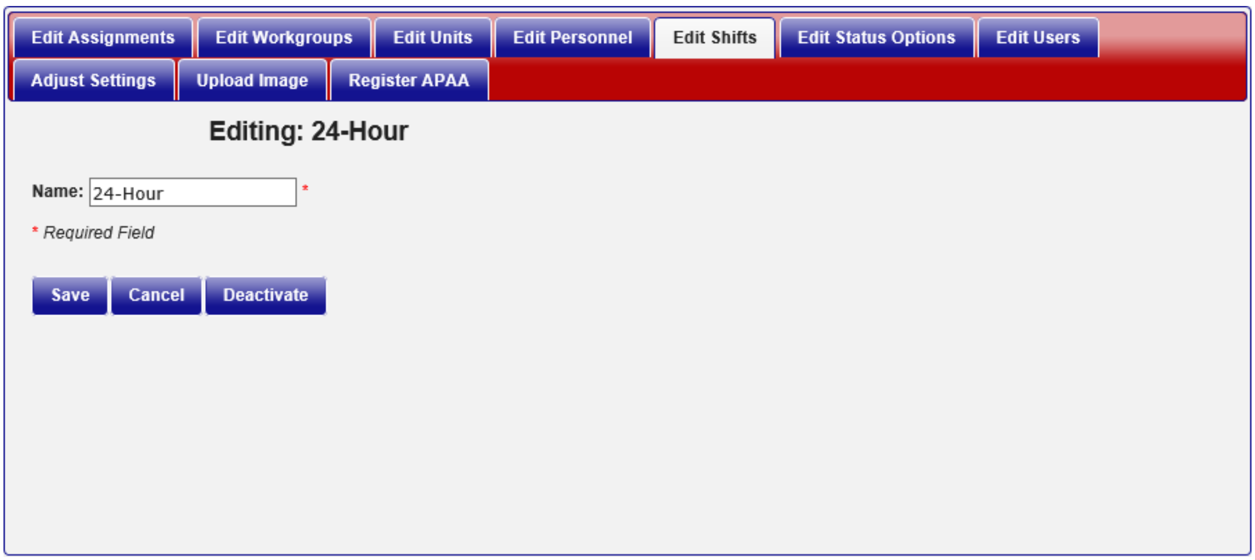


Figure 7-19. Edit Existing Shift

7.5.2 Create New Shift

Perform the following steps to create a new shift:

1. Click **Create New Shift**.
2. Complete the **Name** field with the name of the new shift.
3. Click **Save** to save the changes. A **Success** window appears to confirm that the changes were saved.

Note: Click **Cancel** to clear all changes and return to the **Edit Shifts** tab.

Once created, the shift will appear in the **Shifts** drop-down menu located in the **Reports** window and in the **Quick Compliance Report** window.

Figure 7-20. Create New Shift

7.6 Edit Status Options

The **`Edit Status Options`** tab allows administrative users to edit existing roster statuses and to create new statuses. This allows users to differentiate between roster statuses (e.g. Draft, Final).

Figure 7-21. Edit Status Options

7.6.1 Edit Existing Status

Perform the following steps to edit an existing status:

1. Select the desired status from the drop-down menu and click **`Edit`**.
2. The screen displays the status name. To edit the status name, click inside the **`Name`** field and make changes.
3. Click **`Save`** to save changes. Refresh the web browser in order for saved changes to take full effect.

Note: Click **`Deactivate`** to remove an existing assignment, and click **`Cancel`** to clear all changes and return to the **`Status Options`** tab.

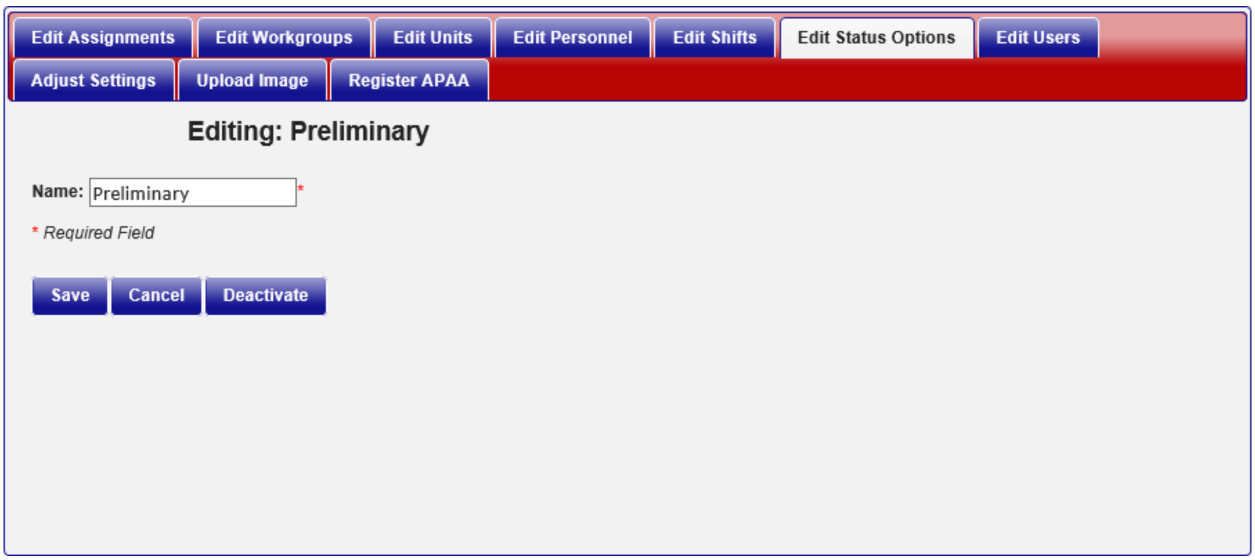


Figure 7-22. Edit Existing Status

7.6.2 Create New Status

1. Click **Create New Status**.
2. Complete the **Name** field with the name of the new shift.
3. Click **Save** to save the changes. A **Success** window appears to confirm that the changes were saved.

Note: Click **Cancel** to clear all changes and return to the **Edit Status Options** tab.

Once created, the status will appear in the menu upon roster submission and in the **Quick Compliance Report** window.

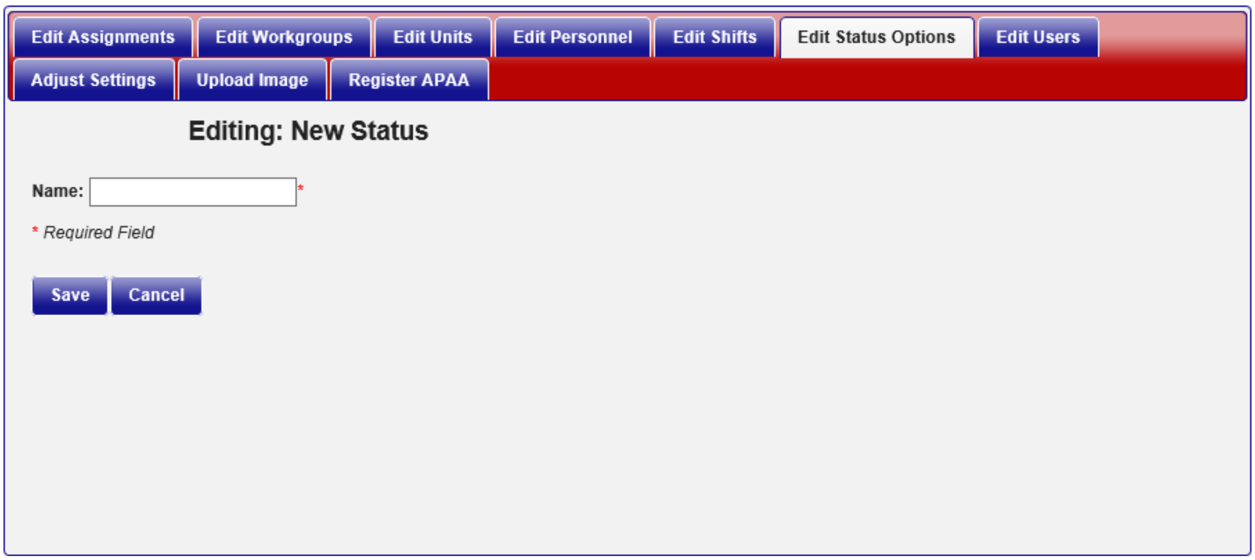


Figure 7-23. Create New Status

7.7 Edit Users

The **`Edit Users`** tab allows administrative users to edit existing EasyStaff® users and to create new users.

Figure 7-24. Edit Users Tab

7.7.1 Edit Existing User

Perform the following steps to edit an existing user:

1. Select the desired user from the drop-down menu and click **`Edit`**.
2. Modify the **`First Name`**, **`Last Name`**, **`Rank`**, **`Email`**, and **`Login Name`** fields as needed.
3. Change the user's password by clicking the **`Change Password`** button and completing the **`Password`** and **`Enter Password Again`** fields that appear.
4. Check whether to give the user **`Assets (Loan, Return)`**, **`Assets (Edit, Add)`**, and/or **`Administrator`** privileges. Users with **`Assets (Loan, Return)`** privileges can loan and return assets, and users with **`Assets (Edit, Add)`** can edit, add, loan, and return assets. Administrators can view and modify all items in the Admin tab. Note that both **`Assets`** options must be checked in order for Administrators to view and modify assets.
5. Click **`Save`** to save changes. A **`Success`** window appears to confirm that the changes were saved.

Note: Click **`Deactivate`** to remove an existing assignment, and click **`Cancel`** to clear all changes and return to the **`Edit Users`** tab.

Figure 7-25 shows User Rich in the **`Edit Users`** tab.

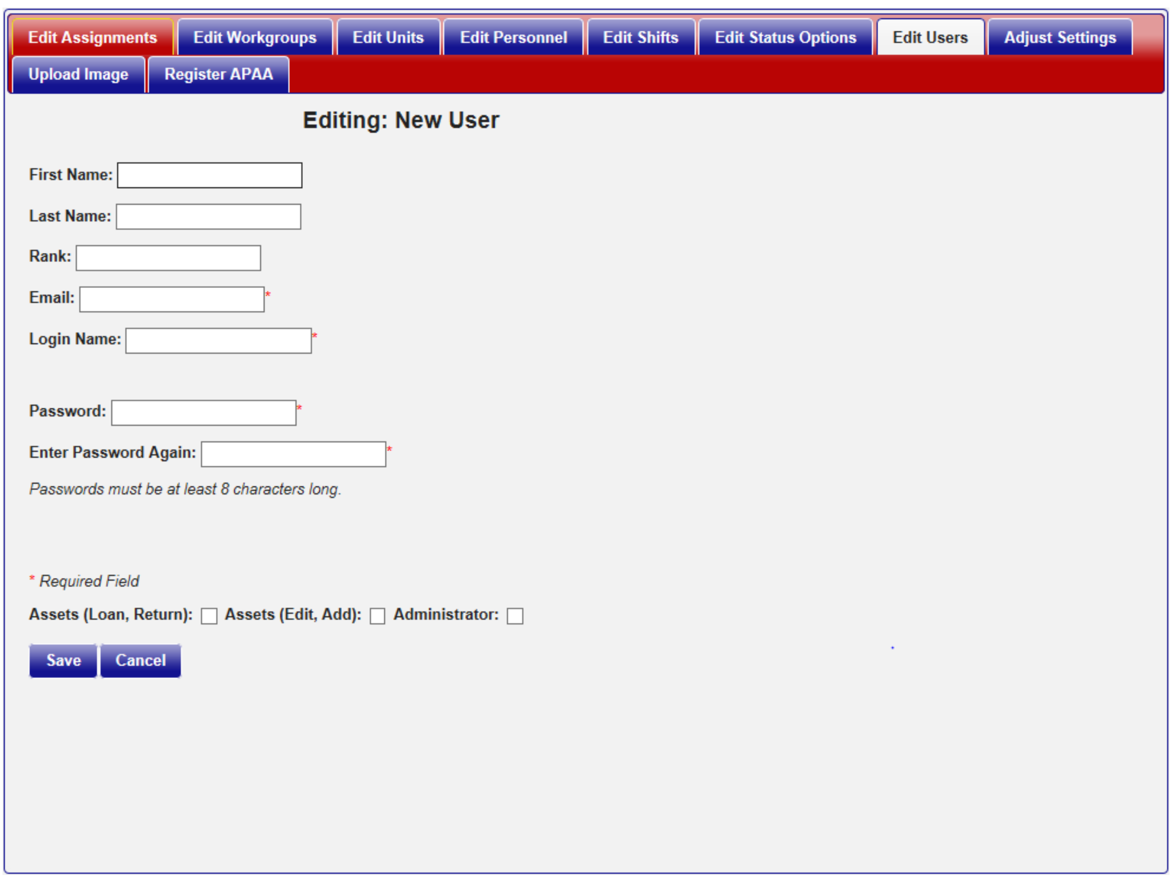


Figure 7-25. Edit Existing User

7.7.2 Create New User

Perform the following steps to create a new user:

1. Click **Create New User**.
2. Complete the **First Name**, **Last Name**, **Rank**, **Email**, and **Login Name** fields.
3. Complete the **Password** and **Enter Password Again** fields.
4. Check whether to give the user **Assets (Loan, Return)**, **Assets (Edit, Add)**, and/or **Administrator** privileges. Users with **Assets (Loan, Return)** privileges can loan and return assets, and users with **Assets (Edit, Add)** can edit and add assets. Administrators can view and modify all items in the Admin tab. Note that both **Assets** options must be checked in order for Administrators to view and modify assets.
5. Click **Save** to save changes. A **Success** window appears to confirm that the user was created.

Note: Click **Cancel** to clear all changes and return to the **Edit Users** tab.

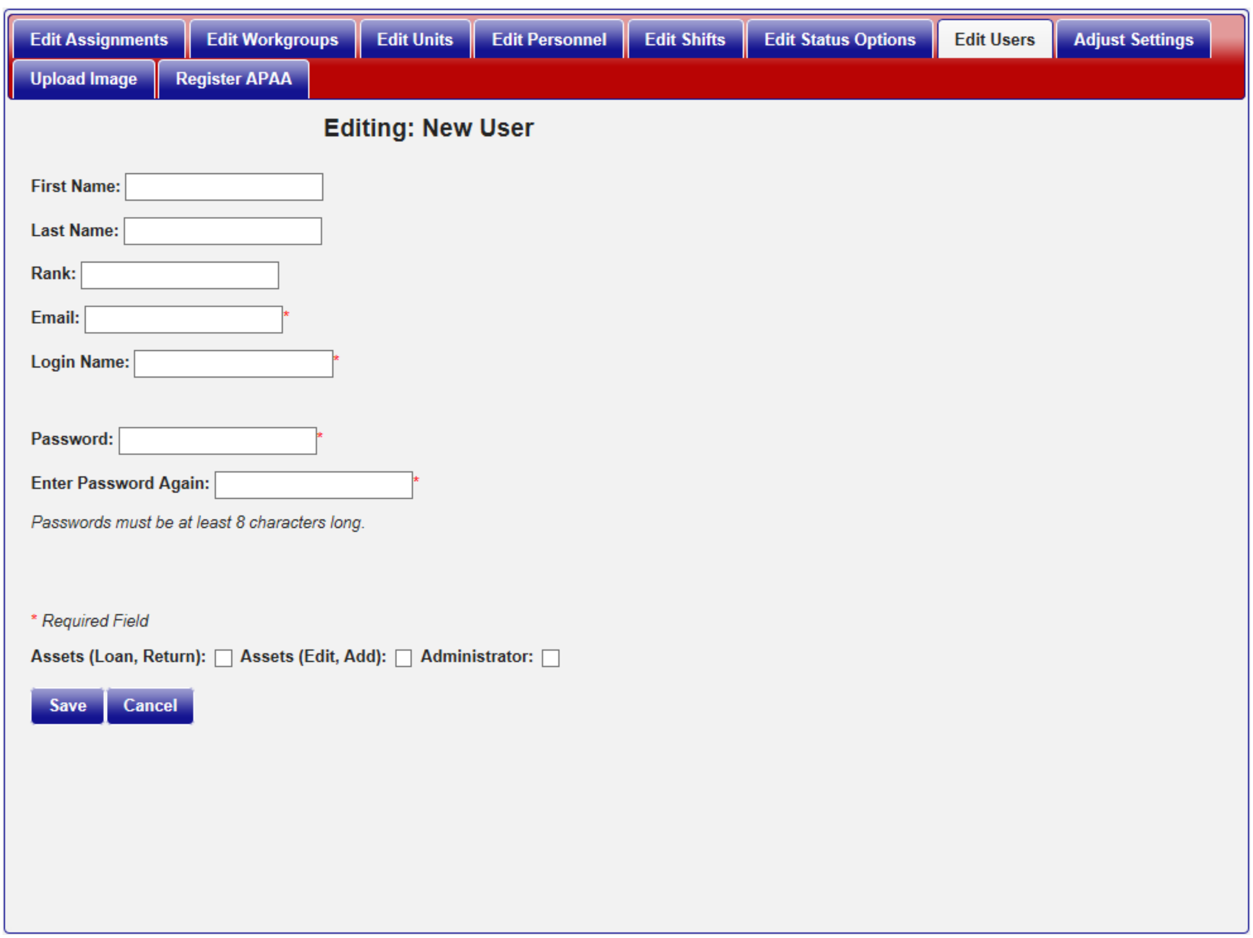


Figure 7-26. Create New User

7.8 Adjust Settings

The **Adjust Settings** tab allows users with administrative privileges to change how roster items are displayed and saved. This tab contains the following options:

- **Carry Rosters Forward?**: Choose whether to automatically populate future rosters with the previous roster's information to save time.
- **How to Choose Units for Rosters?**: Choose whether to use autocomplete or a drop-down menu when selecting units for rosters.
- **How to Display Assets Within a Roster?**: Choose whether to sort assets by alias or by ID.
- **Viewing Assets in Reports?**: Choose whether to view only loaded assets or all assets in reports.

To adjust settings, select the radio button next to the desired settings and click **Save**. A **Success** window appears to confirm that the changes were saved, and users are logged out automatically and must log in again.

Figure 7-27. Adjust Settings

7.9 Upload Image

The **Upload Images** tab allows users with administrative privileges to upload an image for the department. The image will appear on the EasyStaff® login screen and in the upper-right corner.

To upload an image, click **Browse** to navigate to the image file, then click **Ok**. Note that only .png, .jpg, and .gif files are accepted. A **Success** window appears to confirm that the image was added.

To remove an image, click **Remove Current Image**. A **Success** window appears to confirm that the image was removed.

Figure 7-28. Upload Image

7.10 Register APAA

The **`Register APAA`** tab allows users with Administrator privileges to generate the license key for the APAA installation. This is necessary for installations on systems without access to the internet. To generate the license key, complete the **`Hardware ID`**, **`Windows SID`**, **`Computer Name`**, and optional **`Extra Identifier`** fields, then click **`Submit`**.

The license key and the number of remaining installs appears under the form (see Figure 7-30). Click **`Clear`** to hide the license key. To retrieve a license key that has been generated already, complete the **`Hardware ID`**, **`Windows SID`**, and **`Computer Name`** fields, then click **`Submit`**.

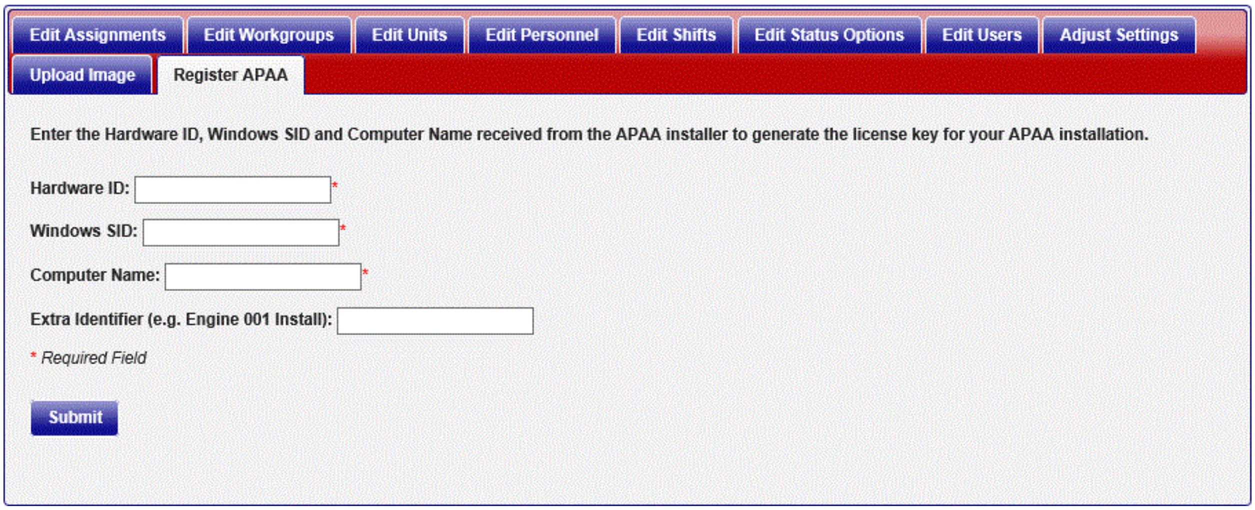


Figure 7-29. Register APAA Tab

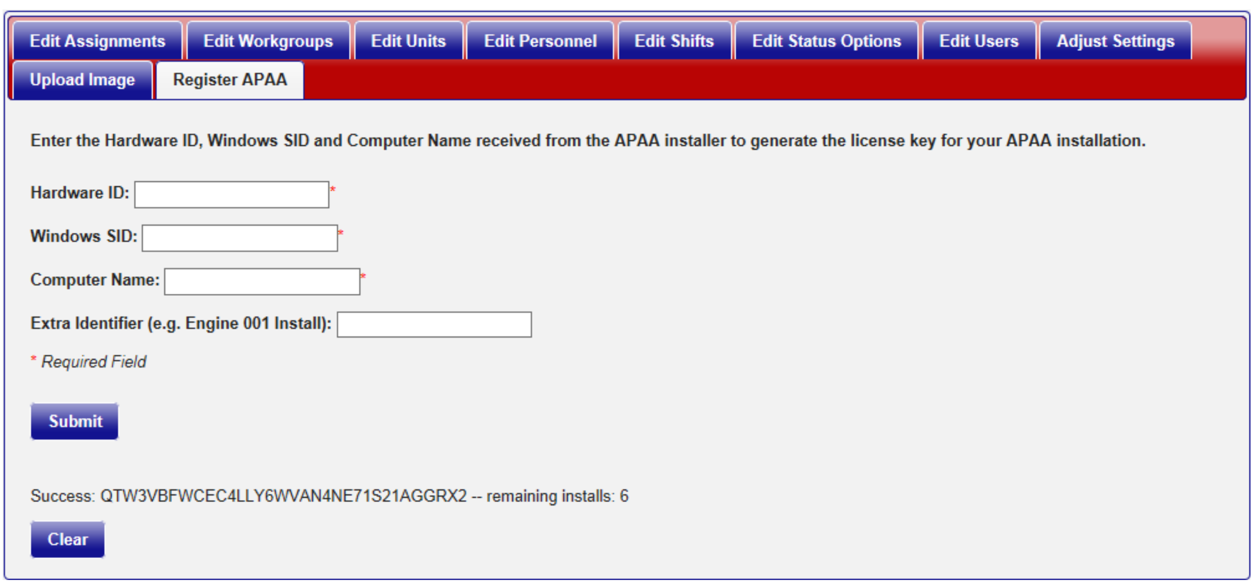


Figure 7-30. Successful APAA Registration

8.0 Assets

The **`Assets`** tab displays a list of all regular and spare radios and masks and their attributes. Users with **`Assets (Loan, Return)`** and/or **`Assets (Edit, Add)`** privileges have access to this tab and can perform the following functions:

- **`Filter`**: Check and uncheck asset attributes to filter asset list results.
- **`Refresh Asset Table`**: Refresh the list of assets.
- **`Add Asset`**: Add a new asset (only available to users with **`Assets (Edit, Add)`** privileges).
- **`Upload Assets`**: Upload a list of new assets (only available to users with **`Assets (Edit, Add)`** privileges).
- **`Download Assets`**: Download a .txt file report of assets.
- **`Edit`**: Edit an existing asset (only available to users with **`Assets (Edit, Add)`** privileges).
- **`Loan`**: Loan an existing asset.
- **`Submit For Repairs`**: Submit an existing asset for repairs.

To sort assets by their attributes, click the arrows in each column header. To search for an asset or assets, begin typing an attribute (e.g. **`2306`**, **`REGULAR`**) in the **`Search`** field in the upper-right corner.

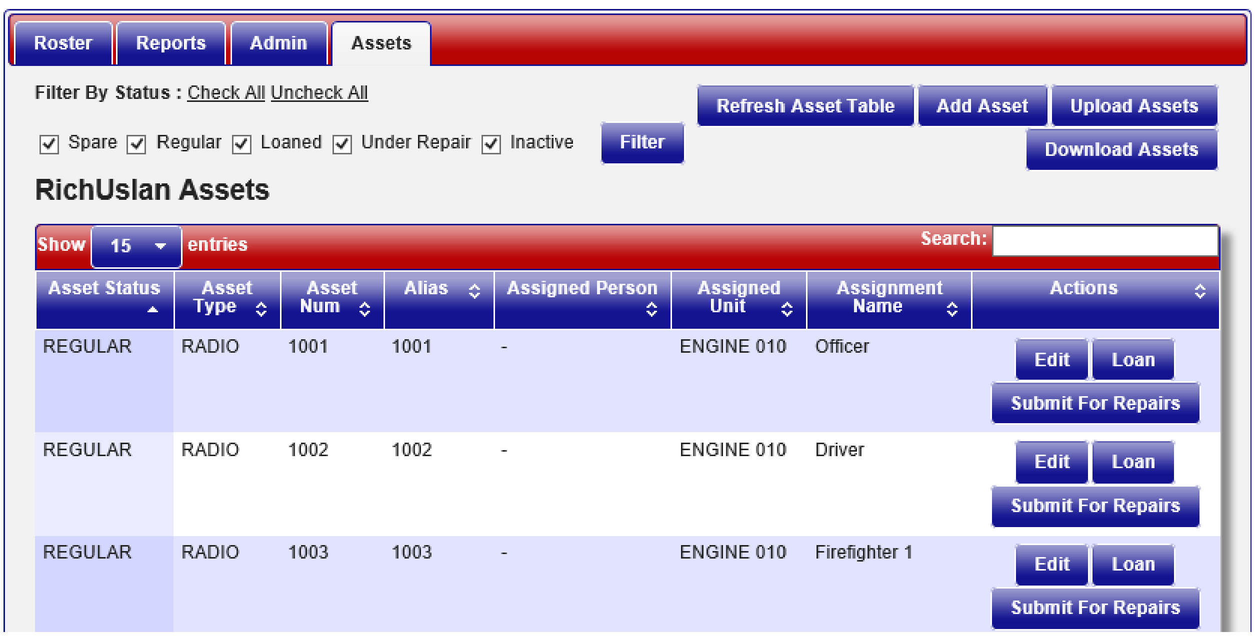


Figure 8-1. Asset List

8.1 Add New Asset

Perform the following steps to add a new asset:

1. From the **Assets** tab, click **Add Asset** in the upper right corner.
2. Choose the correct type from the **Asset Type** drop-down menu.
3. Choose the correct status from the **Asset Status** drop-down menu.
4. Choose whether the asset is to be assigned to a **Unit**, to a **Person**, or to an **Unassigned Alias**.
5. If the asset is to be assigned to a unit, select a unit from the **Select a top-level unit** drop-down menu, then work through the drop-down menus until the desired unit is selected. The **Alias (How Asset Appears in APAA)** information will be selected automatically.
6. If the asset is to be assigned to a person, begin typing the person's name into the **Please Select a Person** field and click the desired person's name.
7. If desired, click **Custom Alias**, click **Yes** in the pop-up window that appears, and complete the **Alias (How Asset Appears in APAA)** field.
8. If the asset is to be given an unassigned alias, complete the **Alias (How Asset Appears in APAA)** field.
9. Click **Submit**. A **Success** window appears to confirm that the asset was added.

Note: Click **Cancel** to clear all changes and return to the **Assets** tab.

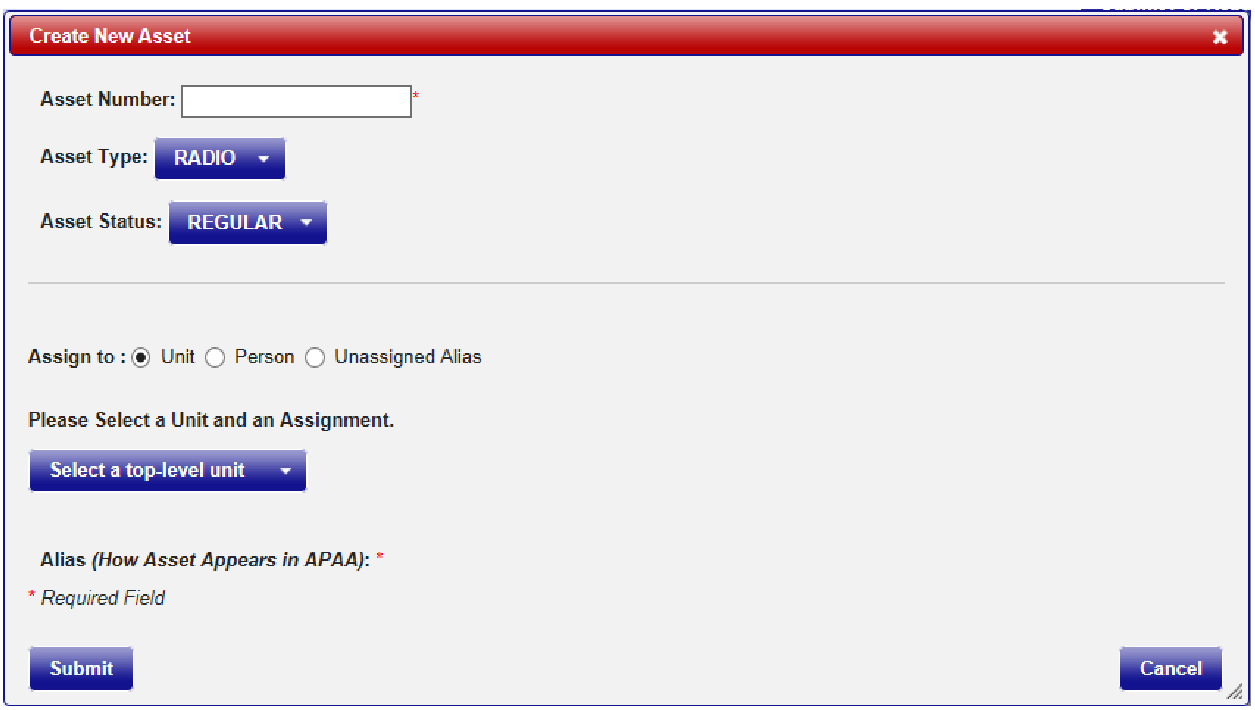


Figure 8-2. Add New Asset

8.2 Upload Assets

Multiple assets can be created at once to save time. Perform the following steps to upload multiple assets:

1. From the **`Assets`** tab, click **`Upload Assets`** in the upper right corner.
2. Create a .csv file with the asset **`Type`**, **`ID Number`**, **`Alias`**, and **`Status`** organized into four columns as described in Figure 8-3.
3. Click **`Browse`** and select the correct .csv file. Refer to Figure 8-4 for a sample correctly formatted .csv file.
4. Click **`Upload`** to upload the assets. A **`Success`** window appears to confirm that the assets were created.

Note: If the .csv file was formatted incorrectly, an **`Error`** window appears (refer to Figure 8-5).

Note: Click **`Cancel`** to return to the **`Assets`** tab.

Figure 8-3 shows an example of using a .csv file to upload multiple assets at once.

Figure 8-4 shows a properly arranged .csv file with asset information.

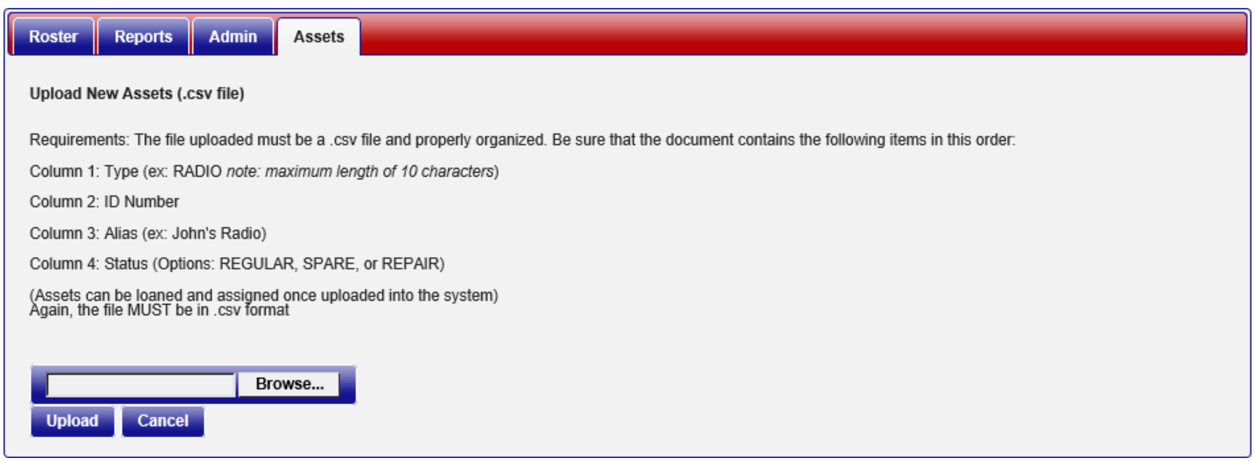


Figure 8-3. Upload Assets

	A	B	C	D
1	RADIO	1234	John's Radio	REGULAR
2	RADIO	2345	Spare1	SPARE

Figure 8-4. Upload Assets .csv File Format

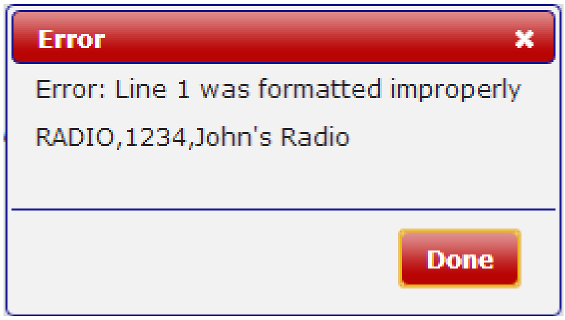


Figure 8-5. Upload Assets Error

8.3 Edit Existing Asset

Perform the following steps to edit an existing asset:

1. From the **Assets** tab, click **Edit** next to the desired asset.
2. Modify the **Asset Number** field as needed.
3. Choose the correct type from the **Asset Type** drop-down menu.
4. Choose the correct status from the **Asset Status** drop-down menu.
5. Choose whether the asset is to be assigned to a **Unit**, to a **Person**, or to an **Unassigned Alias**.
6. If the asset is to be assigned to a unit, select a unit from the **Select a top-level unit** drop-down menu, then work through the drop-down menus until the desired unit is selected. The **Alias (How Asset Appears in APAA)** information will be selected automatically.
7. If the asset is to be assigned to a person, begin typing the person's name into the **Please Select a Person** field and click the desired person's name.
8. If desired, click **Custom Alias**, click **Yes** in the pop-up window that appears, and complete the **Alias (How Asset Appears in APAA)** field.
9. If the asset is to be given an unassigned alias, complete the **Alias (How Asset Appears in APAA)** field.
10. Click **Submit**. A **Success** window appears to confirm that the asset was edited.

Note: Click **Cancel** to clear all changes and return to the **Assets** tab.

Figure 8-6. Edit an Asset

8.4 Loan Asset

Perform the following steps to loan an asset:

1. From the **Assets** tab, click **Loan** next to the desired asset.
2. Choose whether the asset is to be loaned to a **Unit**, to a **Person**, or to an **Unassigned Alias**.
3. If the asset is to be loaned to a unit, select a unit from the **Select a top-level unit** drop-down menu, then work through the drop-down menus until the desired unit is selected. The **Alias (How Asset Appears in APAA)** information will be selected automatically.
4. If the asset is to be loaned to a person, begin typing the person's name into the **Please Select a Person** field and click the desired person's name.
5. If desired, click **Custom Alias**, click **Yes** in the pop-up window that appears, and complete the **Alias (How Asset Appears in APAA)** field.
6. If the asset is to be given an unassigned alias, complete the **Alias (How Asset Appears in APAA)** field.
7. Click **Submit**. A **Success** window appears to confirm that the asset was loaned.

Note: Click **Cancel** to clear all changes and return to the **Assets** tab.

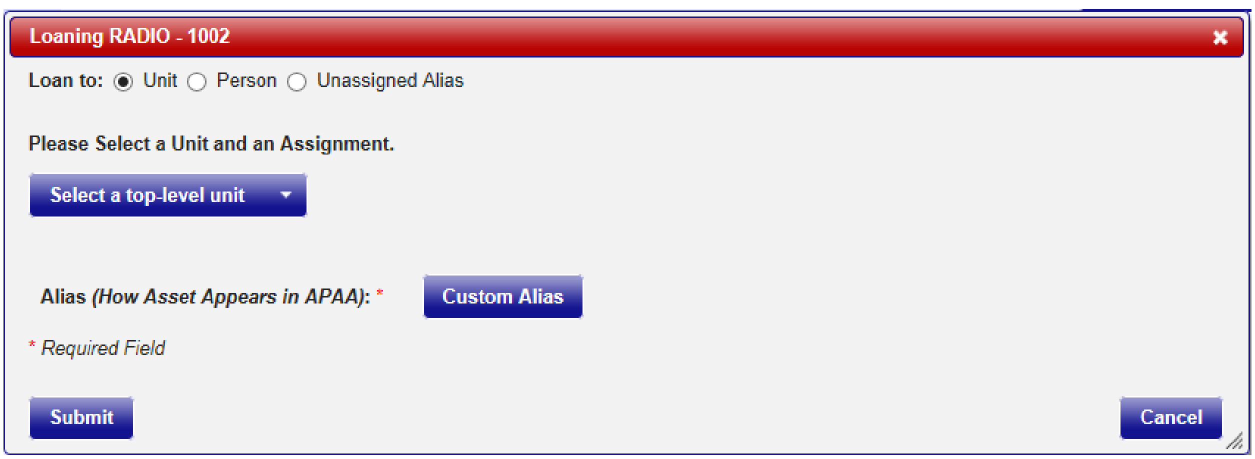


Figure 8-7. Loan Asset

8.5 Submit Asset for Repairs

Perform the following steps to submit an asset for repairs:

1. From the **`Assets`** tab, click **`Submit for Repairs`** next to the desired asset.
2. Click **`Yes`** in the **`Confirm Deactivation`** Window. A **`Success`** window appears to confirm that the asset was deactivated.

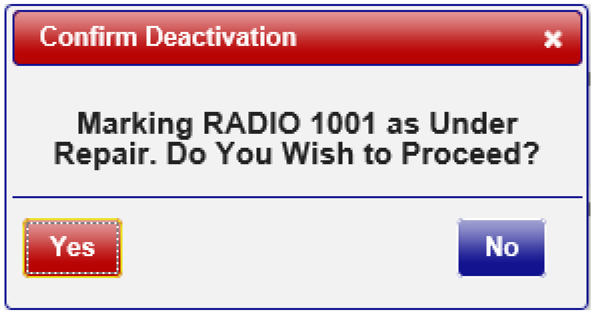


Figure 8-8. Confirm Deactivation

8.6 Mark Asset as Repaired

Perform the following steps to mark an asset as repaired:

1. From the **`Assets`** tab, click **`Mark As Repaired`** next to the desired asset.
2. Click **`Yes`** in the **`Mark As Repaired`**. A **`Success`** window appears to confirm that the asset was deactivated.

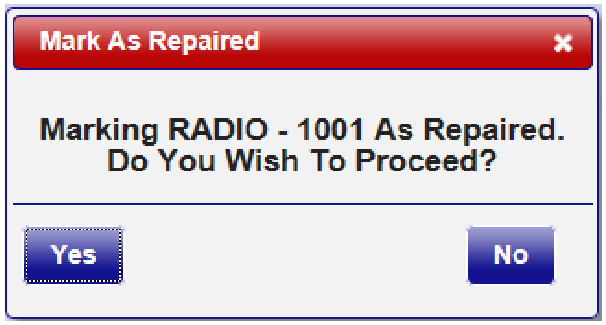


Figure 8-9. Mark As Repaired